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Siebel Reporting Specifications Document

September 27, 2000

**SFA Ombudsman Case Tracking System (OCTS)
Version 2.0**

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Introduction

This document contains the Siebel Report Specifications for the Office of the Ombudsman Customer Relationship Management (CRM) Implementation effort. It is organized into the following sections:

- Siebel Reporting Overview
- Siebel Charts
- Actuate Reports
- OCTS 2.0 Charts Correlating to OCTS 1.0 Reports
- OCTS 2.0 Siebel Charts To Be Produced
- OCTS 2.0 Siebel Charts Screen Prints
- Reporting Validation

This document is Deliverable #11.2.10 Siebel Report Specifications Document as outlined in Task Order #11, Modification 1: Ombudsman CRM Implementation.

Siebel Reporting Overview

There are two types of reports associated with the Siebel application—Siebel Charts and Actuate Reports. Siebel Charts are graphical illustrations of data associated with a particular view. For example, the Service Requests Closed SR Analysis by Owner chart (on Page 5) is associated with the Closed Service Requests by Owner view on the Service tab. Actuate Reports, on the other hand, are a non-graphical listing of specific data elements in a report layout format. The Actuate Report is in a fixed format to display specified fields within the Siebel application.

The following sections will describe the Siebel Charts and Actuate Reports in greater detail.

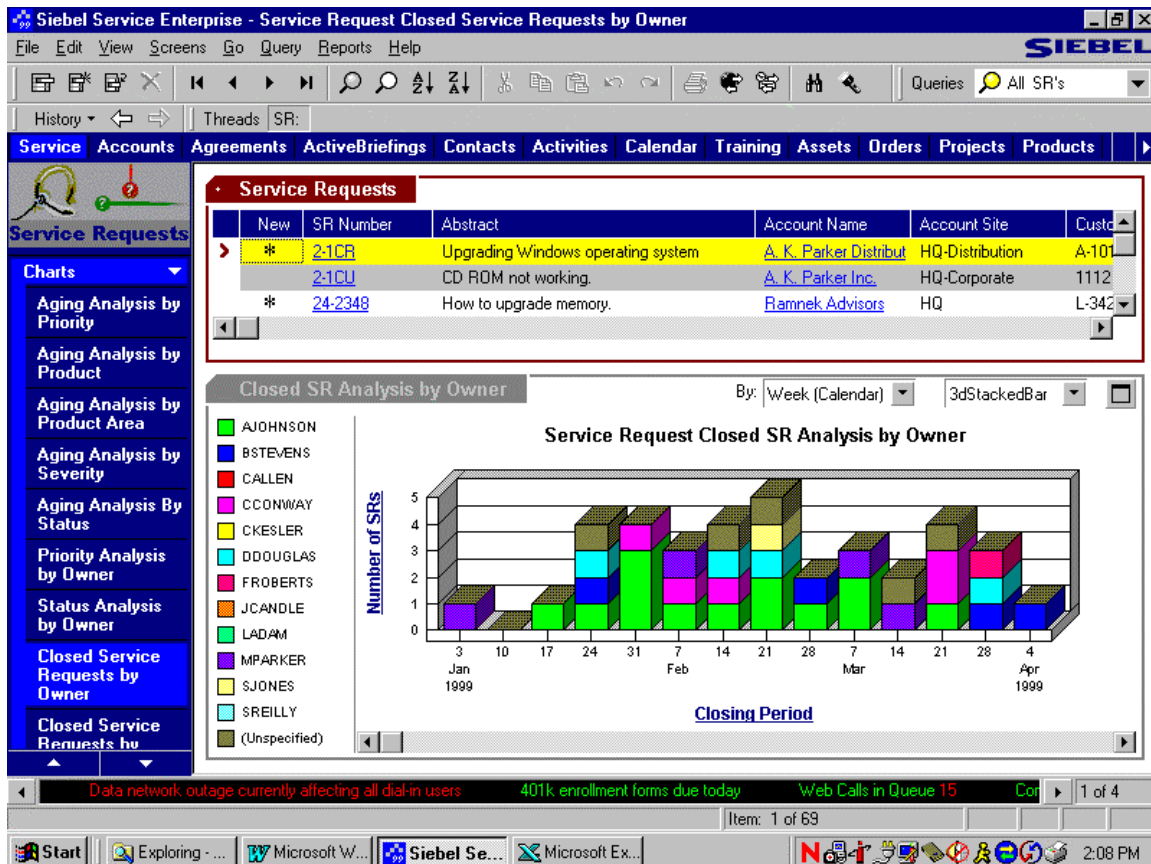
Siebel Charts

Overview of Siebel Charts

Siebel Charts are an integral part of the Siebel Service application. Siebel Charts are interactive reports which query data from the Siebel application and visually display the data in a graphical, chart format (e.g. pie chart, bar chart, line). Additionally, the user can modify the chart by changing the interval of time desired to be displayed (e.g. by year, by month, by week, by days).

Siebel Charts are based on the querying of fields within a list applet (Service Request list applet below). In other words, the user can select/modify a query in a list applet, which will alter the selection of data used to generate a specific Siebel Chart.

An example of a Siebel Chart is the Service Request Closed SR Analysis by Owner chart shown below:



Printing Siebel Charts

Siebel Charts can be printed quite simply. To print the chart, the user should highlight the applet containing the graph (e.g. Closed SR Analysis by Owner shown below), select File, and then Print. The chart can then be printed in a portrait or a landscape orientation. The printing function is illustrated below.

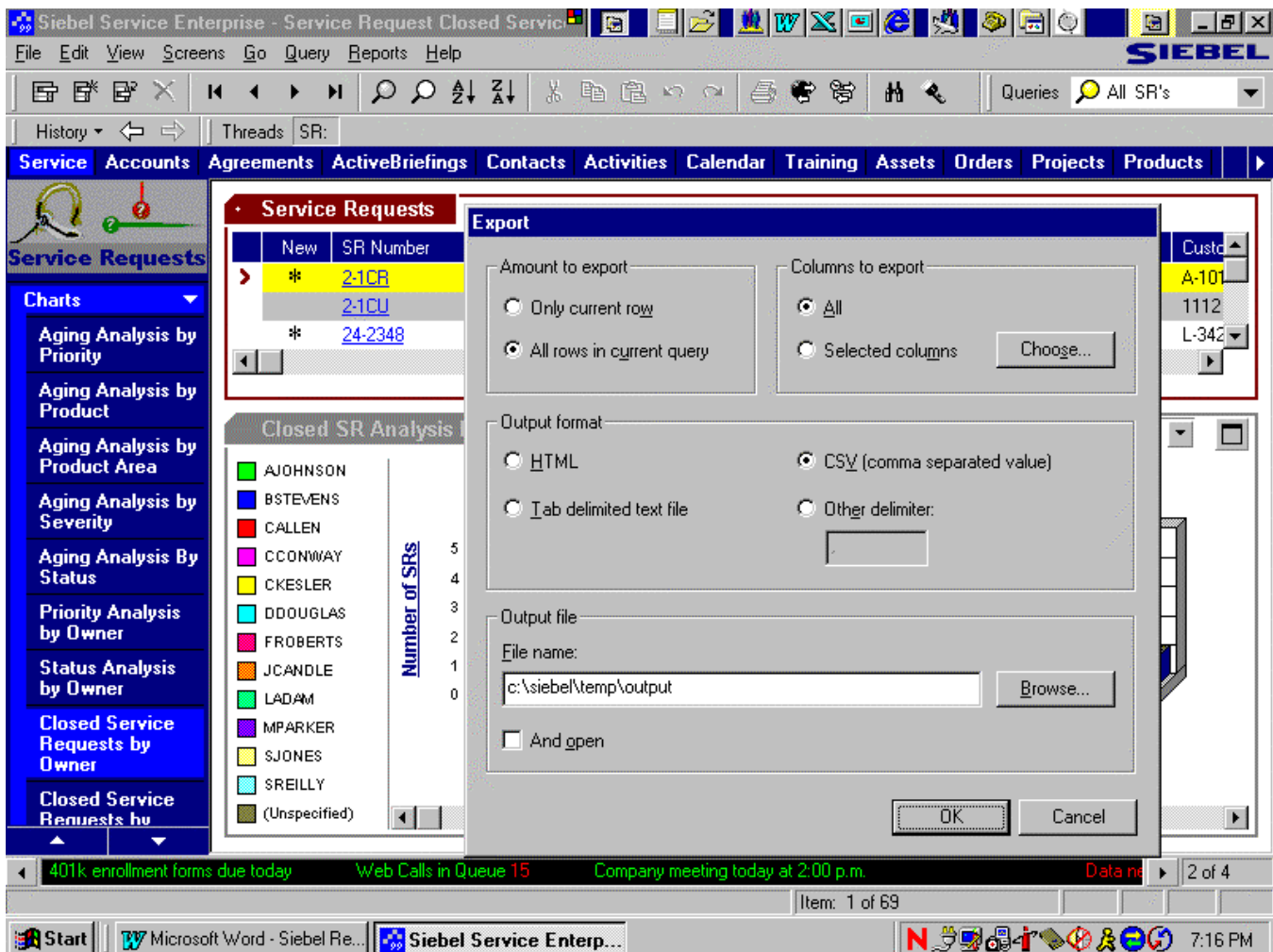
The screenshot displays the Siebel Service Enterprise interface. The 'File' menu is open, showing the 'Print' option (Ctrl+P) highlighted. The main window shows the 'Closed SR Analysis by Owner' chart, which is a 3D stacked bar chart showing the number of Service Requests (SRs) by owner over time. The chart is titled 'Service Request Closed SR Analysis by Owner' and shows data for January, February, and March 1999. The Y-axis represents the 'Number of SRs' (0 to 5). The X-axis represents the 'Closing Period' with dates: 3 Jan 1999, 10 Jan 1999, 17 Jan 1999, 24 Jan 1999, 31 Jan 1999, 7 Feb 1999, 14 Feb 1999, 21 Feb 1999, 28 Feb 1999, 7 Mar 1999, 14 Mar 1999, 21 Mar 1999, 28 Mar 1999, and 4 Apr 1999. The legend lists owners: CALLEN, CCONWAY, CKESLER, DDOUGLAS, FROBERTS, JCANDLE, LADAM, MPARKER, SJONES, SREILLY, and (Unspecified). The status bar at the bottom shows 'In Queue 15', 'Company meeting today at 2:00 p.m.', 'Data network outage currently affecting all dial-in users', and 'Item: 1 of 69'.

SR Number	Abstract	Account Name	Account Site	Custo
2-1CR	Upgrading Windows operating system	A. K. Parker Distribut	HQ-Distribution	A-101
2-1CU	CD ROM not working.	A. K. Parker Inc.	HQ-Corporate	1112
4-2348	How to upgrade memory.	Ramnek Advisors	HQ	L-342

Exporting the Data Associated with Siebel Charts into Microsoft Excel

While the Siebel Chart data cannot be printed from the Siebel application itself, the data can be easily exported into a Microsoft Excel spreadsheet. To export the data, the user should highlight the list applet containing the graph (e.g. Service Requests shown below), select File, and then Export. From the Export window (shown below), select the CSV (comma separated value) option in the Output format section of the window. Next, enter a file name and path citing a destination of where to save the CSV file.

After saving the file, open Windows Explorer and launch (double-click) the CSV file. The data will then be presented in a Microsoft Excel spreadsheet containing all the fields and column headings from the Siebel list applet. The user can then format the Microsoft Excel spreadsheet as desired. The export function is illustrated below.



Listing of Siebel Charts

This section contains a complete listing of “vanilla” Siebel Service Charts for the Business Components used by OCTS 2.0.

Please note the Business Components utilized in the OCTS 2.0 Siebel application are:

Account Tab:

- Account
- Account Attachment
- Account Note

Cases Tab:

- Service Request
- Service Request Attachment

Contact Tab:

- Contact
- Contact Attachment
- Contact Note

Other:

- Action (Activity Tab)
- Action Attachment (Activity Tab)
- Asset Management – Asset (Loans Tab)
- Calendar
- Customer Survey
- Product Defect (Issues Tab)
- Product Defect Attachment (Issues Tab)
- Sales Tool (Literature Tab)
- Solution (Results in Results Screen)
- Solutions SR/PD (Results in Cases Screen)
- Smart Script Player

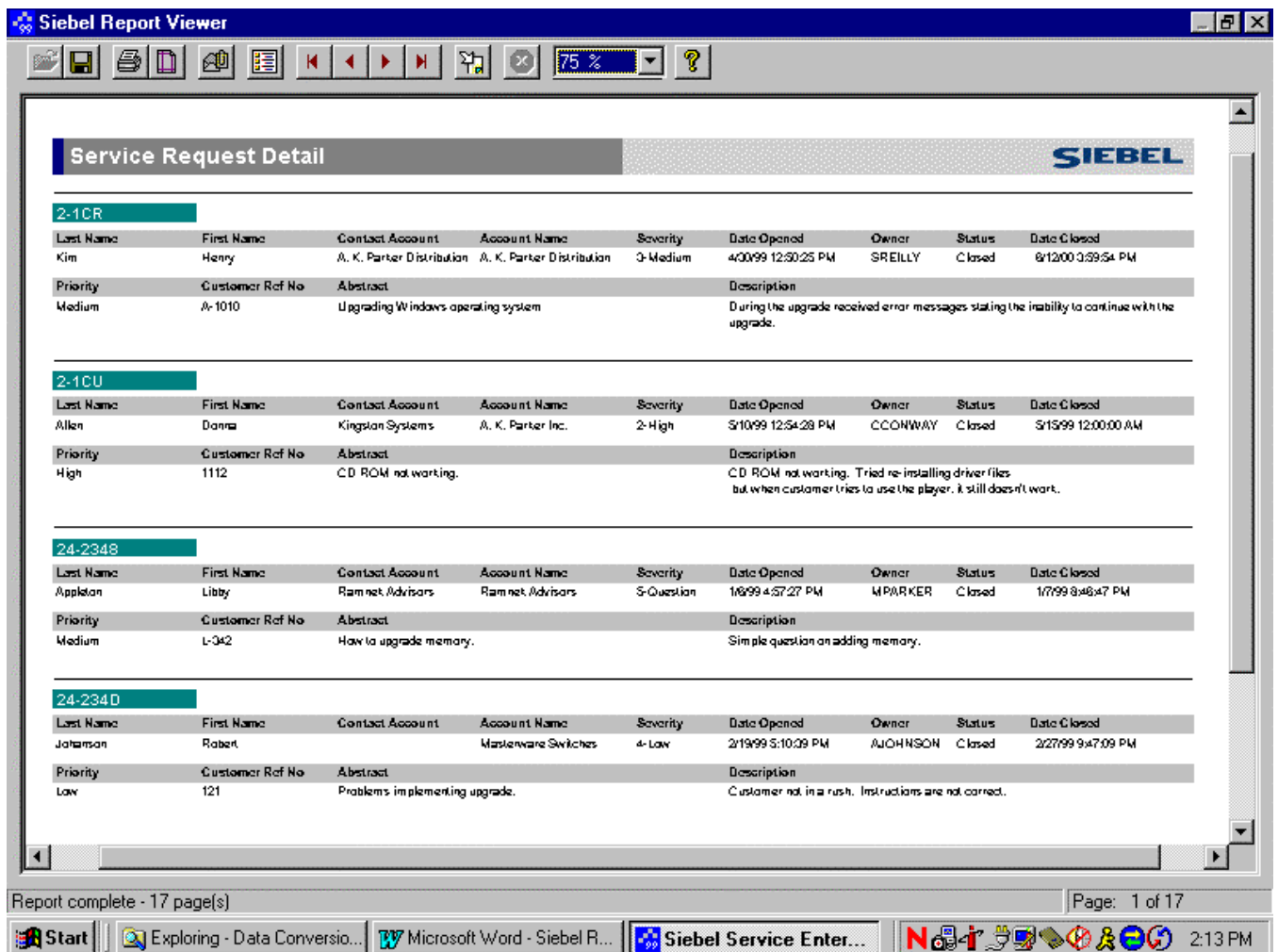
No.	Name	Business Component	Appears in Siebel GUI (Deactivated in OCTS 2.0)
1.	Aging Analysis by Priority	Service Request	Yes
2.	Aging Analysis by Product	Service Request	Yes
3.	Aging Analysis by Product Area	Service Request	Yes
4.	Aging Analysis by Status	Service Request	Yes
5.	Priority Analysis by Owner	Service Request	Yes
6.	Status Analysis by Owner	Service Request	Yes
7.	Closed Service Requests by Owner	Service Request	Yes
8.	Closed Service Requests by Product	Service Request	Yes
9.	Customer Analysis	Service Request	Yes
10.	New Service Requests	Service Request	Yes
11.	New Service Requests by Owner	Service Request	Yes
12.	New Service Requests by Product	Service Request	Yes
13.	Product Analysis	Service Request	Yes
14.	Product Version Analysis	Service Request	Yes
15.	Severity and Priority Analysis	Service Request	Yes
16.	Status and Area Analysis	Service Request	Yes
17.	Trend Analysis by Product	Service Request	Yes
18.	Trend Analysis by Product Area	Service Request	Yes
19.	Trend Analysis by Severity	Service Request	Yes
20.	Trend Analysis by Source	Service Request	Yes
21.	Trend Analysis by Status	Service Request	Yes
22.	Account Analysis by Rep	Accounts	Yes
23.	State Analysis	Accounts	Yes
24.	Territory Analysis	Accounts	Yes
25.	Job Title Analysis	Contacts	Yes
26.	State Analysis	Contacts	Yes
27.	Account and Type Analysis	Action	Yes
28.	Contact Analysis	Action	Yes
29.	Status and Priority Analysis	Action	Yes

Actuate Reports

Overview of Actuate Reports

Actuate, a product of Actuate Software Corporation, produces Actuate reports which query data from the Siebel application and write the data to a predefined report layout—an Actuate Report.

An example of an Actuate report is the Service Request Detail Actuate Report shown below:



The screenshot shows the Siebel Report Viewer application window. The title bar reads "Siebel Report Viewer". The menu bar includes File, Edit, View, and Help. The toolbar contains icons for file operations, navigation, and a zoom dropdown set to 75%. The report content is titled "Service Request Detail" and features the Siebel logo in the top right corner. The report is divided into four sections, each with a green header bar: 2-1CR, 2-1CU, 24-2348, and 24-234D. Each section contains a table with columns: Last Name, First Name, Contact Account, Account Name, Severity, Date Opened, Owner, Status, and Date Closed. Below each table is a summary row with columns: Priority, Customer Ref No, Abstract, and Description. The status of all requests is "Closed".

Service Request Detail								
SIEBEL								
2-1CR								
Last Name	First Name	Contact Account	Account Name	Severity	Date Opened	Owner	Status	Date Closed
Kim	Henry	A. K. Parter Distribution	A. K. Parter Distribution	3-Medium	4/20/99 12:50:25 PM	SREILLY	Closed	8/12/00 3:59:54 PM
Priority	Customer Ref No	Abstract		Description				
Medium	A-1010	Upgrading Windows operating system		During the upgrade received error messages stating the inability to continue with the upgrade.				
2-1CU								
Last Name	First Name	Contact Account	Account Name	Severity	Date Opened	Owner	Status	Date Closed
Allen	Donna	Kingston Systems	A. K. Parter Inc.	2-High	5/10/99 12:54:28 PM	CCONWAY	Closed	5/15/99 12:00:00 AM
Priority	Customer Ref No	Abstract		Description				
High	1112	CD ROM not working.		CD ROM not working. Tried re-installing driver files but when customer tries to use the player, it still doesn't work.				
24-2348								
Last Name	First Name	Contact Account	Account Name	Severity	Date Opened	Owner	Status	Date Closed
Appleton	Libby	Ramnet Advisors	Ramnet Advisors	5-Question	1/8/99 4:57:27 PM	MPARKER	Closed	1/7/99 8:46:47 PM
Priority	Customer Ref No	Abstract		Description				
Medium	L-342	How to upgrade memory.		Simple question on adding memory.				
24-234D								
Last Name	First Name	Contact Account	Account Name	Severity	Date Opened	Owner	Status	Date Closed
Johanson	Robert		Martensware Switches	4-Low	2/19/99 5:10:39 PM	AJOHNSON	Closed	2/27/99 9:47:09 PM
Priority	Customer Ref No	Abstract		Description				
Low	121	Problems implementing upgrade.		Customer not in a rush. Instructions are not correct.				

Report complete - 17 page(s) Page: 1 of 17

Taskbar: Start | Exploring - Data Conversio... | Microsoft Word - Siebel R... | Siebel Service Enter... | 2:13 PM

Listing of Actuate Reports

The following is a complete listing of Actuate Reports for Siebel Service.

Please note that none of these Actuate Reports have been customized for OCTS 2.0 Release 1.0.

This listing is categorized by the Business Components utilized in the OCTS 2.0 Siebel application. In other words, the first 28 Actuate Reports are the “vanilla” Siebel Service Actuate Reports for the Business Components utilized by OCTS 2.0.

No.	Name	Business Component	Template Name	Appears in Siebel GUI?	Actuate or Access Report
1.	Service Request Activity - All	Service Request	SRVREQAA	Yes	CSSActuateReportViewer
2.	Service Request Activity - Public	Service Request	SRVREQPA	Yes	CSSActuateReportViewer
3.	Service Request Aging Analysis	Service Request	SRVRQAGAN	No	CSSActuateReportViewer
4.	Service Request Detail	Service Request	SRVREQDT	Yes	CSSActuateReportViewer
5.	Service Request Summary	Service Request	SRVREQSM	Yes	CSSActuateReportViewer
6.	Account Review	Account	ACREVIEW	No	CSSActuateReportViewer
7.	Account Service Detail	Account	ACSVCDDET	Yes	CSSActuateReportViewer
8.	Account Service Profile	Account	ACSVCPRO	Yes	CSSActuateReportViewer
9.	Account Summary	Account	ACSUM	Yes	CSSActuateReportViewer
10.	Accounts - Current Query	Account	ACLIST	Yes	CSSActuateReportViewer
11.	Current Account Service Profile	Account	CUACCSVC	Yes	CSSActuateReportViewer
12.	TAS - Corporate Profile	Account	TASCORPP	No	CSSActuateReportViewer
13.	Contacts - Alphabetic Phone List	Contact	CNTPHON	Yes	CSSActuateReportViewer
14.	Contacts - By Account	Contact	CNTACCT	Yes	CSSActuateReportViewer
15.	Contacts - By Opportunity	Contact	CNTOPP	Yes	CSSActuateReportViewer
16.	Contacts - By State	Contact	CNTSTATE	Yes	CSSActuateReportViewer
17.	Contacts - Current Query	Contact	CNTLIST	Yes	CSSActuateReportViewer
18.	Activity - Current Query	Action	ACTLIST	Yes	CSSActuateReportViewer
19.	FS Field Engineer Activity Summary	Action	FEASUM	Yes	CSSActuateReportViewer
20.	FS Field Engineer Detail	Action	FEADDET	Yes	CSSActuateReportViewer
21.	Calendar - Daily	Calendar	CLDAY	No	CSSActuateReportViewer
22.	Calendar - Monthly	Calendar	CLMON	No	CSSActuateReportViewer

No.	Name	Business Component	Template Name	Appears in Siebel GUI?	Actuate or Access Report
23.	Calendar – Weekly	Calendar	CLWEEK	No	CSSActuateReportViewer
24.	Contact – Current Query(Personal)	Contact(Personal)	CNTLISTPER	No	CSSActuateReportViewer
25.	Contacts – Alphabetic Phone List(Personal)	Contact(Personal)	CNTPHONPER	No	CSSActuateReportViewer
26.	Product Defect - Current Query	Product Defect	PRODEFQ	No	CSSActuateReportViewer
27.	Product Defect Activity	Product Defect	PRODEFAC	No	CSSActuateReportViewer
28.	Literature – Current Query	Sales Tool	LITCUR	No	CSSActuateReportViewer
29.	Admin Competitors List - Current Query	Admin Competitor	ADCOMP		CSSActuateReportViewer
30.	Admin Decision Issues - Current Query	Admin Decision Issue	ADDECIS		CSSActuateReportViewer
31.	Admin Product Line - Current Query	Admin Product Line	ADPRODLI		CSSActuateReportViewer
32.	Admin Literature - Current Query	Admin Sales Tool	ADLIT		CSSActuateReportViewer
33.	Application Upgrade Attribute List	Application Upgrade Log	APPUPATT		CSSActuateReportViewer
34.	Application Upgrade Object List	Application Upgrade Log	APPUPOBJ		CSSActuateReportViewer
35.	Assignment Manger Detail	Assignment Group	ASMANDET		CSSActuateReportViewer
36.	Territory Assignment Detail	Assignment Group	TERASDET		CSSActuateReportViewer
37.	Bug Fix - Current Query	Bugs	BGLIST		CSSActuateReportViewer
38.	Bugs - By Area	Bugs			CSSAccessReport
39.	Bugs - Status Summary	Bugs			CSSAccessReport
40.	Campaign – Current Query	Campaign	CAMPLIST		CSSActuateReportViewer
41.	Rules - Current Record	Cfg CD Item Explorer BusComp	RULESCR		CSSActuateReportViewer
42.	Rules – All	Cfg Rules Report Buscomp	RULESAL		CSSActuateReportViewer
43.	Admin Client – Current Query	Client	ADLIST		CSSActuateReportViewer
44.	Competitors List - Current Query	Competitor	COMPLIST		CSSActuateReportViewer
45.	Correspondence - Current Query	Correspondence	CORESP		CSSActuateReportViewer
46.	FS Cycle Count Detail	Cycle Counting	CYCCOUNTDET		CSSActuateReportViewer
47.	Decision Issues - Current Query	Decision Issue	DESISS		CSSActuateReportViewer
48.	Employee List - Current Query	Employee	EMPLIST		CSSActuateReportViewer
49.	PS – Employee Time & Expense Summary	Employee	emptesum		CSSActuateReportViewer
50.	PS – Employee Utilization	Employee	emputl		CSSActuateReportViewer

No.	Name	Business Component	Template Name	Appears in Siebel GUI?	Actuate or Access Report
51.	EC Expense Report	Expense	ECEXPREP		CSSActuateReportViewer
52.	Expense Report	Expense	EXPREP		CSSActuateReportViewer
53.	Expense Summary Report - Accounts	Expense	ESRACC		CSSActuateReportViewer
54.	Expense Summary Report - Charge Number	Expense	ESRCHARGE		CSSActuateReportViewer
55.	Expense Summary Report – Opportunities	Expense	ESROPP		CSSActuateReportViewer
56.	FS Below Minimum Inventory Quantity Per Location	FS Bucket (for Report only)	BELOWMIN		CSSActuateReportViewer
57.	FS Product List By Location	FS Bucket (for Report only)	PRODLISTLOC		CSSActuateReportViewer
58.	FS Repair Detail	FS Repair	REPDET		CSSActuateReportViewer
59.	FS Repair Summary	FS Repair	REPSUM		CSSActuateReportViewer
60.	FS Pick Ticket Details	FS Shipping information	PICKTICKET		CSSActuateReportViewer
61.	Literature Fulfillment	Fulfillment	LITFUL		CSSActuateReportViewer
62.	Incentive Component Payout	Incentive Compensation Component Payout	INCOMPAY		CSSActuateReportViewer
63.	Employee Achievement Report	Incentive Compensation Employee Position	EMPACH		CSSActuateReportViewer
64.	Compensation Statement	Incentive Compensation Employee Position (Compensatable)	COMPSTAT		CSSActuateReportViewer
65.	Admin Products - Current Query	Internal Product	ADPROD		CSSActuateReportViewer
66.	Products – Current Query	Internal Product	PRODCQ		CSSActuateReportViewer
67.	Manager Pipeline Analysis	Opportunity	MGRPIPAN		CSSActuateReportViewer
68.	Opportunities - By City	Opportunity	OPCITY		CSSActuateReportViewer
69.	Opportunities - By Close Date	Opportunity	OPCLODAT		CSSActuateReportViewer
70.	Opportunities - By Sales Cycle Stage	Opportunity	OPSLSCYC		CSSActuateReportViewer
71.	Opportunities - By Sales Rep	Opportunity	OPSLSREP		CSSActuateReportViewer
72.	Opportunities - By Sales Territory	Opportunity	OPSLSTER		CSSActuateReportViewer
73.	Opportunities - By Source	Opportunity	OPSRC		CSSActuateReportViewer
74.	Opportunities - By Source Date	Opportunity	OPSRCDAT		CSSActuateReportViewer
75.	Opportunities - By State	Opportunity	OPSTATE		CSSActuateReportViewer

No.	Name	Business Component	Template Name	Appears in Siebel GUI?	Actuate or Access Report
76.	Opportunities - By Zip	Opportunity	OPZIP		CSSActuateReportViewer
77.	Opportunities - Pipeline	Opportunity	OPPIPE		CSSActuateReportViewer
78.	Opportunities - Pipeline Analysis	Opportunity	OPPIPEAN		CSSActuateReportViewer
79.	Opportunities - Summary	Opportunity	OPSUM		CSSActuateReportViewer
80.	Opportunity Detail	Opportunity	OPDET		CSSActuateReportViewer
81.	Opportunity List - Current Query	Opportunity	OPLIST		CSSActuateReportViewer
82.	Pipeline Analysis	Opportunity	PIPEANA		CSSActuateReportViewer
83.	Pipeline Report By Rep.	Opportunity	PIPEREP		CSSActuateReportViewer
84.	Quota Summary	Opportunity	QUOSUM		CSSActuateReportViewer
85.	TAS – Individual Profile	Opportunity	TASINPRO		CSSActuateReportViewer
86.	TAS – Opportunity Plan	Opportunity	TASOPLAN		CSSActuateReportViewer
87.	TAS - Sales Plan	Opportunity	TASSPLAN		CSSActuateReportViewer
88.	Orders Detail	Order Entry - Orders	ORDET		CSSActuateReportViewer
89.	Orders Summary	Order Entry - Orders	ORSUM		CSSActuateReportViewer
90.	Executive Worksheet Opportunity Forecast	Person Forecast			CSSActuateReportViewer
91.	Executive Worksheet Opportunity Product Forecast	Person Forecast			CSSActuateReportViewer
92.	Forecast Summary	Person Forecast	FORSUM		CSSActuateReportViewer
93.	Opportunity Forecast	Person Forecast			CSSActuateReportViewer
94.	Opportunity Product Forecast Detail	Person Forecast			CSSActuateReportViewer
95.	Opportunity Product Forecast Summary	Person Forecast			CSSActuateReportViewer
96.	Product Line Forecast Detail	Person Forecast			CSSActuateReportViewer
97.	Product Line Forecast Summary	Person Forecast			CSSActuateReportViewer
98.	Stagger Forecast	Person Forecast			CSSActuateReportViewer
99.	Position List - Current Query	Position	POSLSTCQ		CSSActuateReportViewer
100.	Admin Price List - Current Query	Price List	ADPRICE		CSSActuateReportViewer
101.	Price List – Current Query	Price List	PRICELST		CSSActuateReportViewer
102.	Current Process Instance	Process Instance	CUPROINS		CSSActuateReportViewer
103.	PS – Combined Time & Expense Summary	Project	cotesum		CSSActuateReportViewer
104.	PS – Project Limits	Project	prolmt		CSSActuateReportViewer
105.	PS – Project Time & Expense Summary	Project	prtesum		CSSActuateReportViewer

No.	Name	Business Component	Template Name	Appears in Siebel GUI?	Actuate or Access Report
106.	Event Confirmation	Promotion Account	EVENTCON		CSSActuateReportViewer
107.	PS – Subcontractor Cost & Margin Rate	PS Project Subcontractor	subcomr		CSSActuateReportViewer
108.	Proposal Quote	Quote	QUOTEPRO		CSSActuateReportViewer
109.	Quote - Current Query	Quote	QUOTECQ		CSSActuateReportViewer
110.	Quote Configuration	Quote	QUOTECFG		CSSActuateReportViewer
111.	Standard Quote	Quote	QUOTESTD		CSSActuateReportViewer
112.	Mail Merge	Recipients			CSSAccessReport
113.	Repository Applets - By BusComp	Repository Applet	RPOSAPBC		CSSActuateReportViewer
114.	Repository Business Component	Repository Business Component	RPOSBCFL		CSSActuateReportViewer
115.	Repository Business Object	Repository Business Object	RPOSBOBC		CSSActuateReportViewer
116.	Repository Dock Objects - Current Query	Repository Dock Object	RPOSDOCK		CSSActuateReportViewer
117.	Repository Projects	Repository Project	RPOSPROJ		CSSActuateReportViewer
118.	Repository Tables - Current Query	Repository Table	RPOSTAB		CSSActuateReportViewer
119.	Repository Workflow Object	Repository Workflow Object	RPOSESCA		CSSActuateReportViewer
120.	Campaign Response Detail	Response	CAMPRESPDET		CSSActuateReportViewer
121.	Campaign Response Summary	Response	CAMPRESPSUM		CSSActuateReportViewer
122.	Admin Sales Cycle - Current Query	Sales Cycle Def	ADSLSCYC		CSSActuateReportViewer
123.	Agreement Detail	Service Agreement	AGDET		CSSActuateReportViewer
124.	Agreement Summary	Service Agreement	AGSUM		CSSActuateReportViewer
125.	Current Siebel Remote Session	Session Log	CUDOCSES		CSSActuateReportViewer
126.	Admin Territory - Current Query	Territory	ADTERR		CSSActuateReportViewer
127.	PS - Time Sheet	Time Sheet	timesh		CSSActuateReportViewer
128.	Workflow Log	Workflow Log	ESCLOG		CSSActuateReportViewer
129.	Workflow Policy	Workflow Policy	ESCPOL		CSSActuateReportViewer

OCTS 2.0 Charts Correlating to OCTS 1.0 Reports

OCTS 2.0 Charts Correlating to OCTS 1.0 Scheduled Reports

The following spreadsheet outlines the proposed OCTS 2.0 reports which correlate to existing OCTS 1.0 scheduled reports.

Number	OCTS 2.0 Chart Name	OCTS 1.0 Report
1.	All Cases by Servicing Agency	All Cases Detail Report By Account Servicer
2.	All Cases by Original Issue	All Cases Detail Report By Case Type
3.	All Cases by Date Received	All Cases Detail Report By Date Received
4.	All Cases by Ombudsman Specialist	All Cases Detail Report By Ombudsman Specialist
5.	Open Cases by Servicing Agency	Open Cases Detail Report By Account Servicer
6.	Open Cases by Original Issue	Open Cases Detail Report By Case Type
7.	Open Cases by Date Received	Open Cases Detail Report By Date Received
8.	Open Cases by Ombudsman Specialist	Open Cases Detail Report By Ombudsman Specialist
9.	All Cases by Date Received	Summary Report - All Cases
10.	Open Cases by Date Received	Summary Report - Open Cases

OCTS 2.0 Charts Correlating to Ombudsman March 2000 Report

The following spreadsheet outlines the proposed OCTS 2.0 reports which correlate to existing reports for the Ombudsman March 2000 Report.

Number	OCTS 2.0 Chart Name	OCTS 1.0 Graph
1.	All Cases by Original Issue	Client Reported Issues – General Assistance
2.	All Cases by Original Issue	Client Reported Issues – Problem Assistance
3.	All Cases by Original Issue	Case Type For All Cases

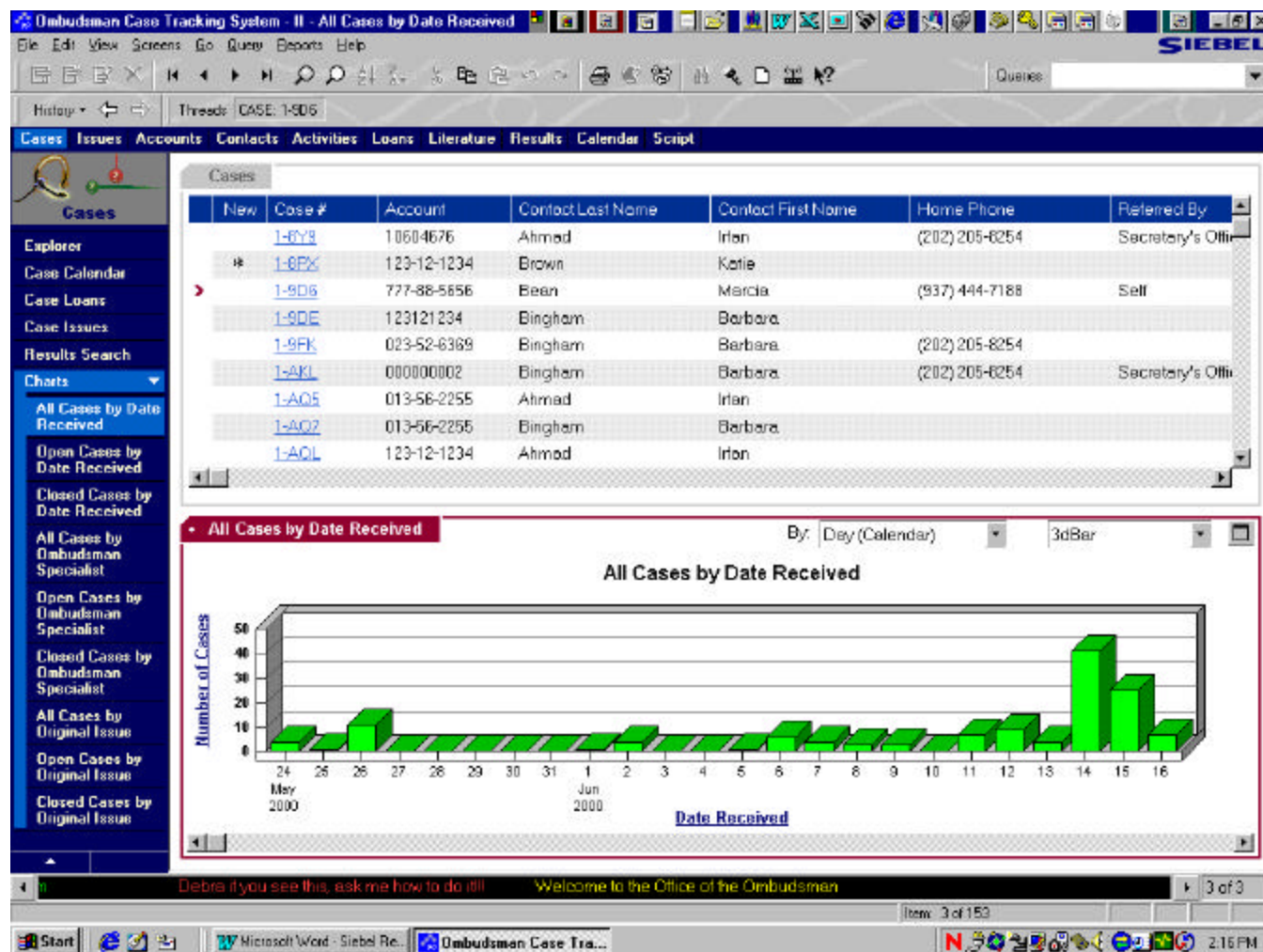
OCTS 2.0 Charts Produced

The following schedule lists the names of the Siebel Charts to be customized for OCTS 2.0 and the date of completion associated with each Chart.

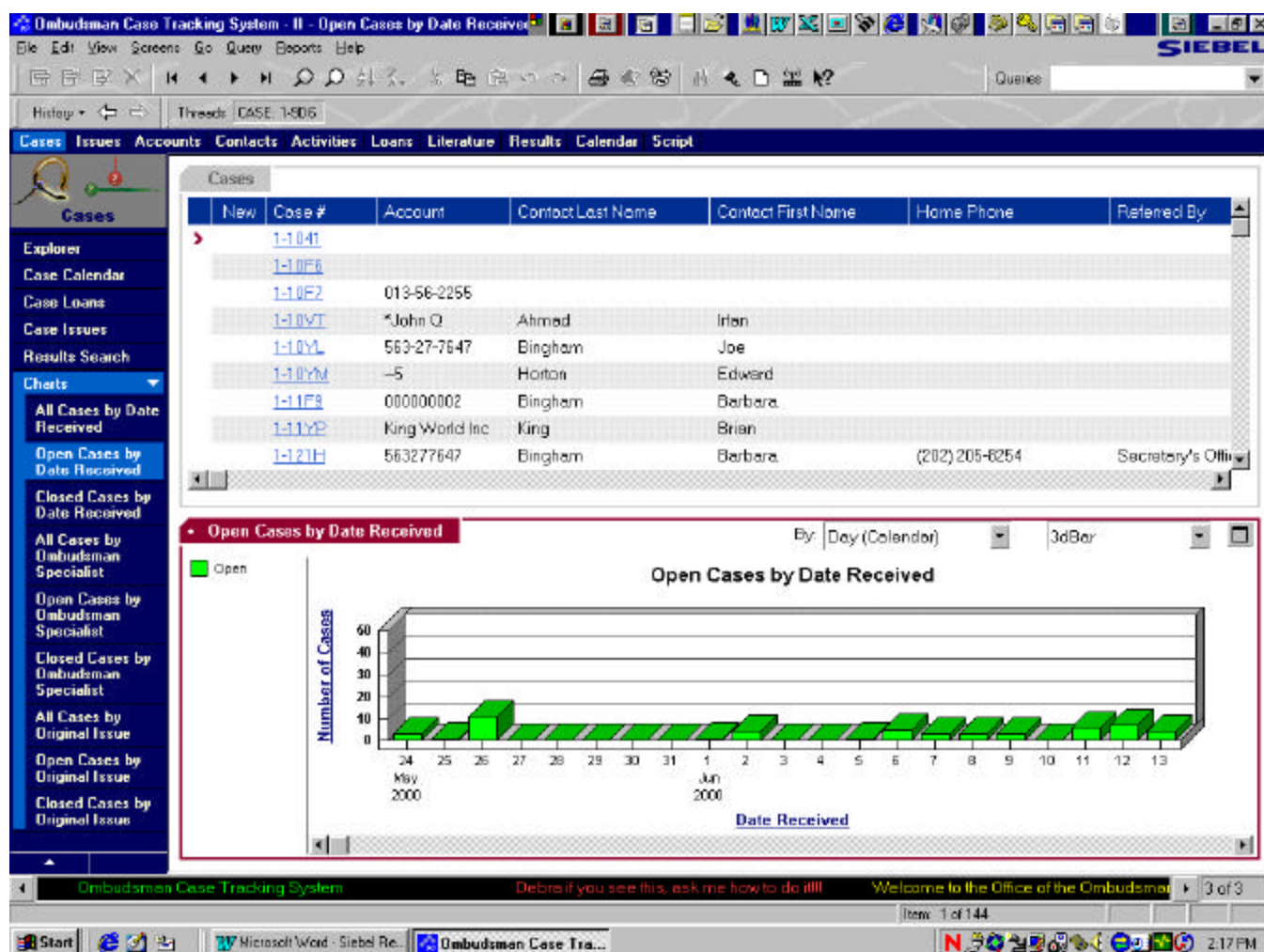
Number	OCTS 2.0 Chart	Date of Completion
1.	All Cases by Date Received	10/01
2.	Open Cases by Date Received	10/01
3.	Closed Cases by Date Received	10/01
4.	All Cases by Ombudsman Specialist	10/01
5.	Open Cases by Ombudsman Specialist	10/01
6.	Closed Cases by Ombudsman Specialist	10/01
7.	All Cases by Original Issue	10/01
8.	Open Cases by Original Issue	10/01
9.	Closed Cases by Original Issue	10/01
10.	All Cases by Servicing Agency	10/01
11.	Open Cases by Servicing Agency	10/01
12.	Closed Cases by Servicing Agency	10/01
13.	Closed Cases by Date Closed	10/01
14.	Number of Issues by Status	10/01
15.	Number of Issues by Sub-Status	10/01
16.	Number of Issues by Ombudsman Specialist	10/01
17.	Number of Issues by Date Opened	10/01
18.	Number of Issues by Date Closed	10/01
19.	Number of Accounts by Account Type	10/01
20.	Number of Accounts by State	10/01
21.	Number of Activities by Status	10/01
22.	Number of Activities by Priority	10/01
23.	Number of Loans by Loan Status	10/01
24.	Number of Loans by Loan Type Description	10/01
25.	Number of Loans by Lender	10/01
26.	Number of Loans by Guaranty Agency Name	10/01
27.	Number of Loans by School Location	10/01
28.	Number of Loans by Lender Servicer Name	10/01
29.	Number of Contacts by Type	10/01
30.	Number of Contacts by Contact Method	10/01

OCTS 2.0 Siebel Charts Screen Prints

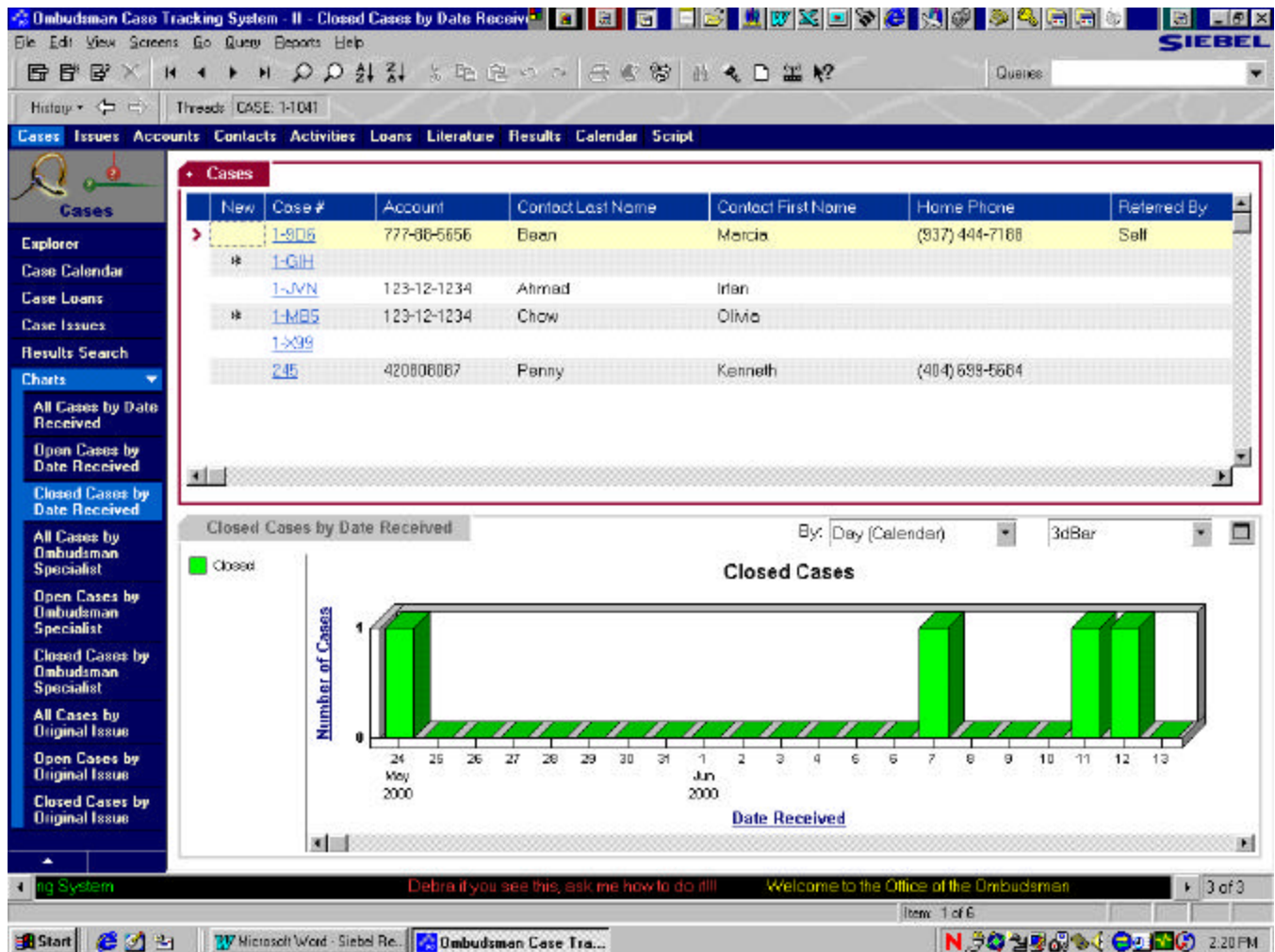
All Cases By Date Received



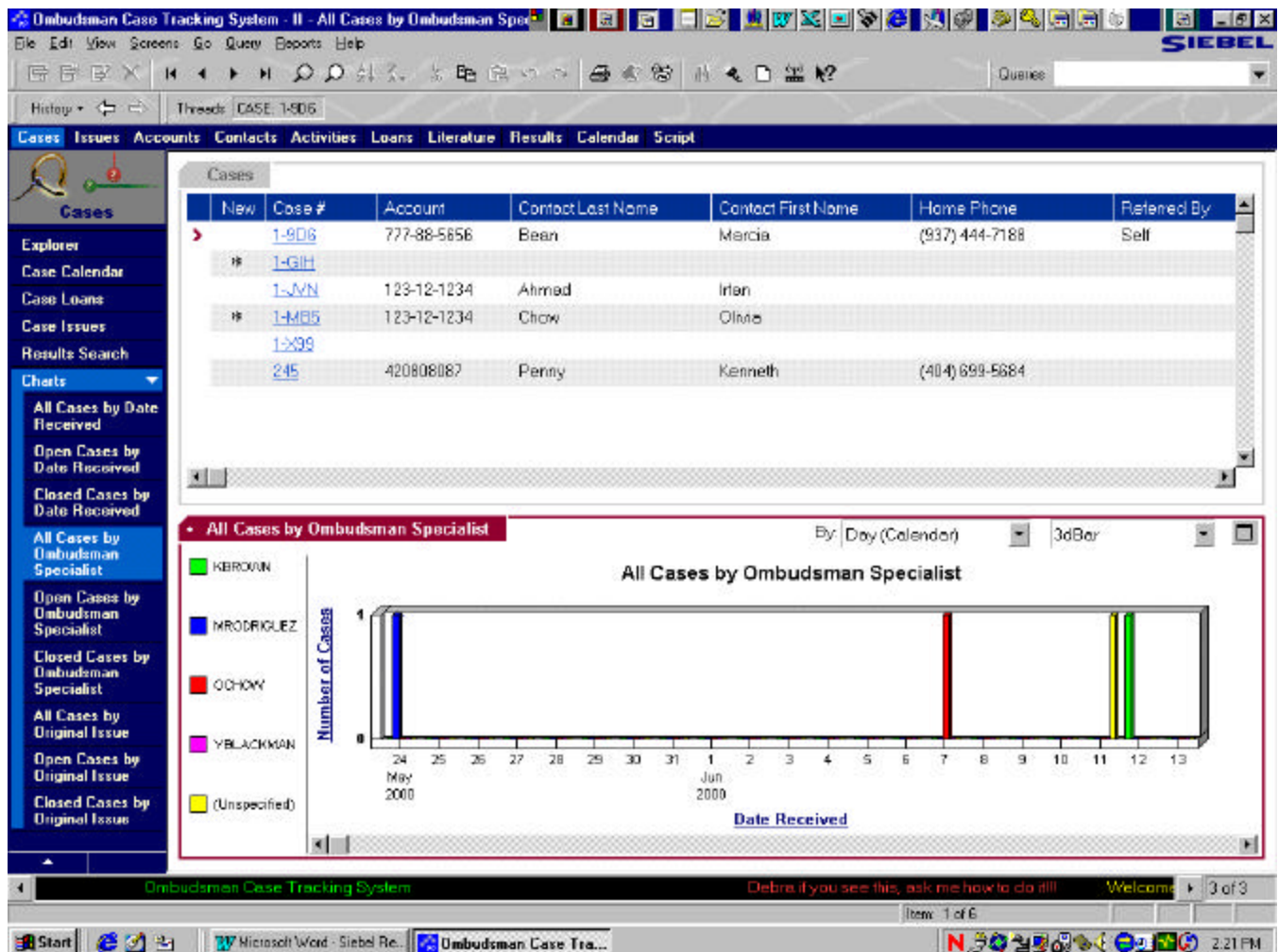
Open Cases By Date Received



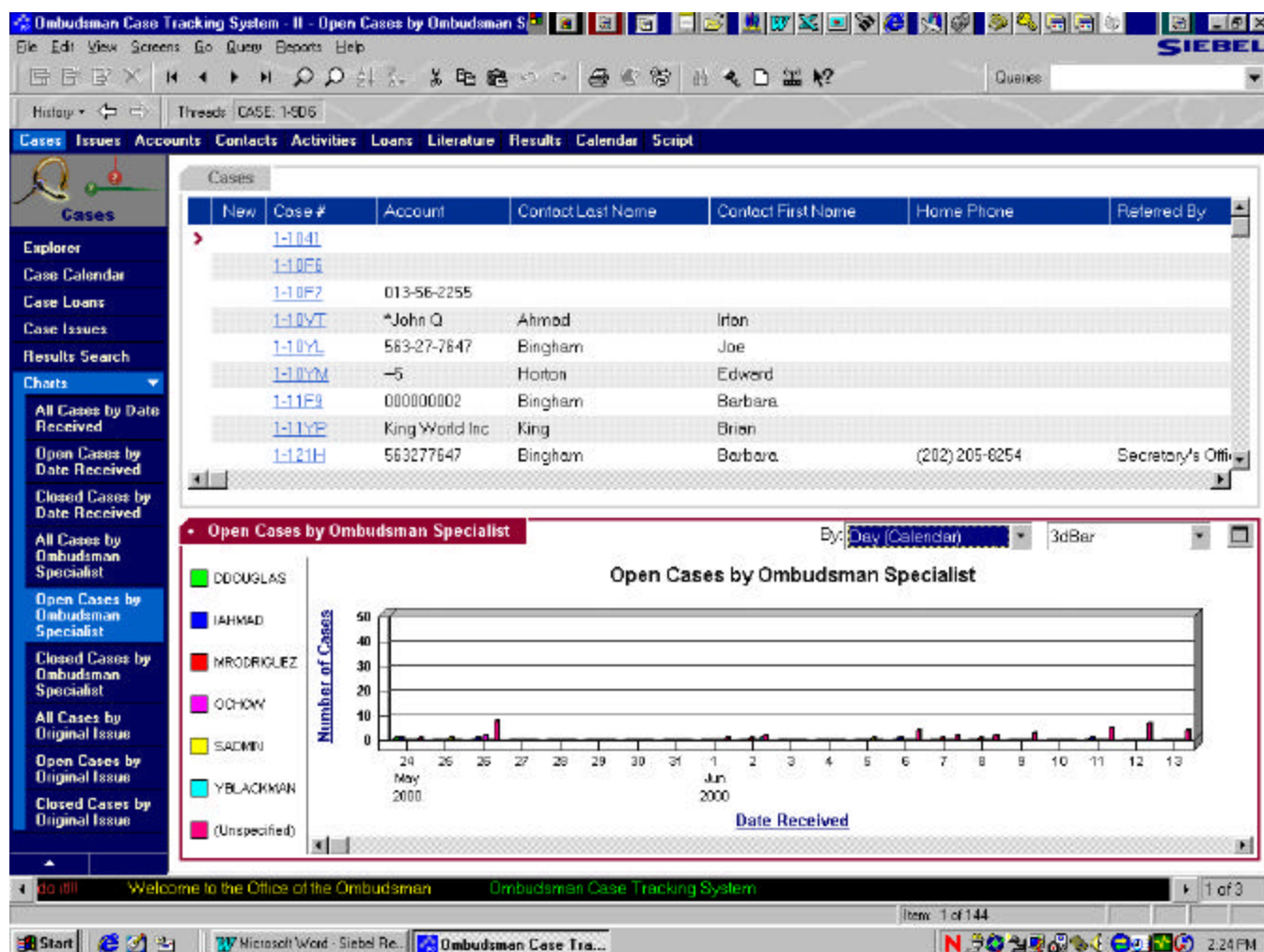
Closed Cases By Date Received



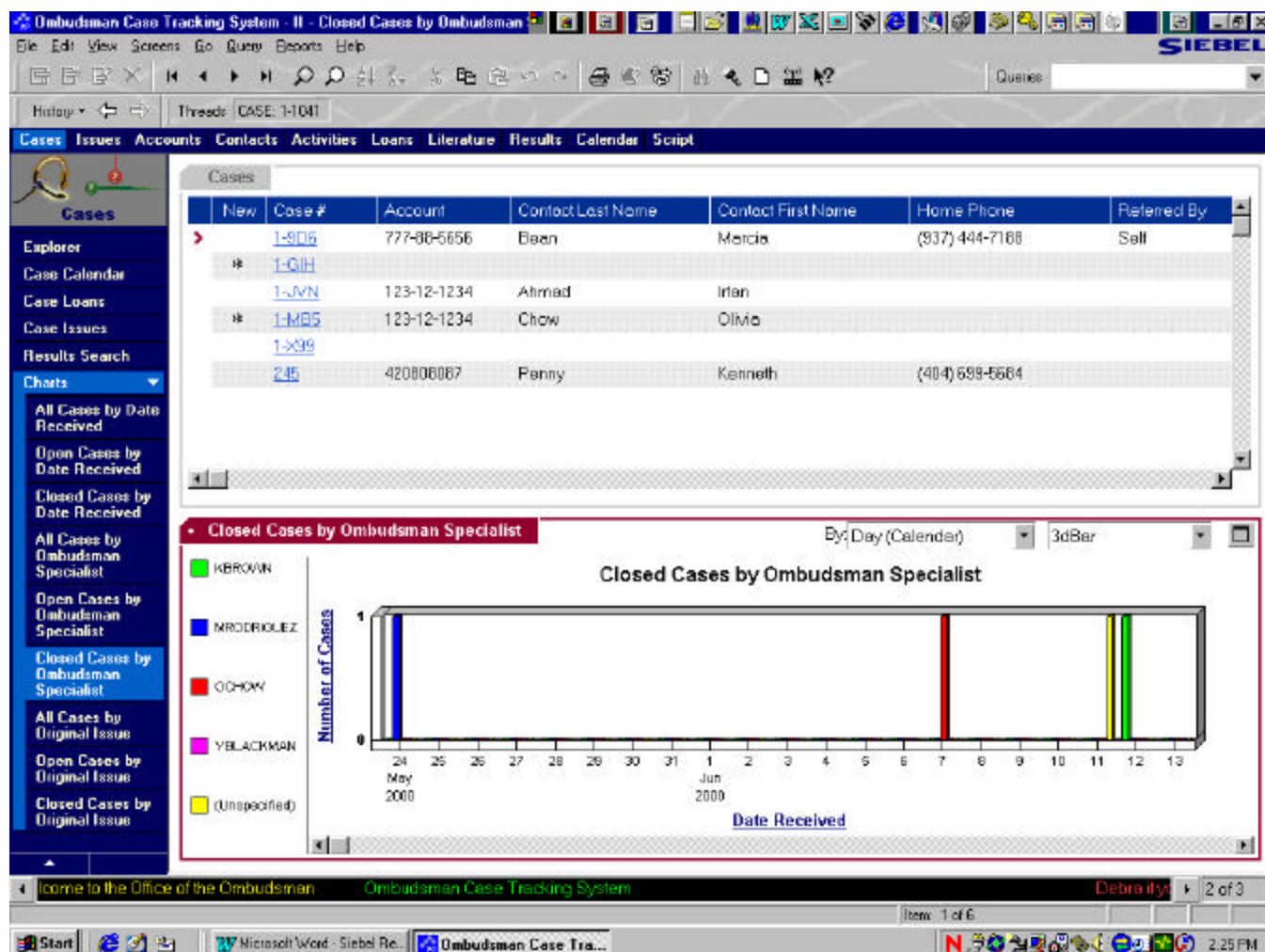
All Cases By Ombudsman Specialist



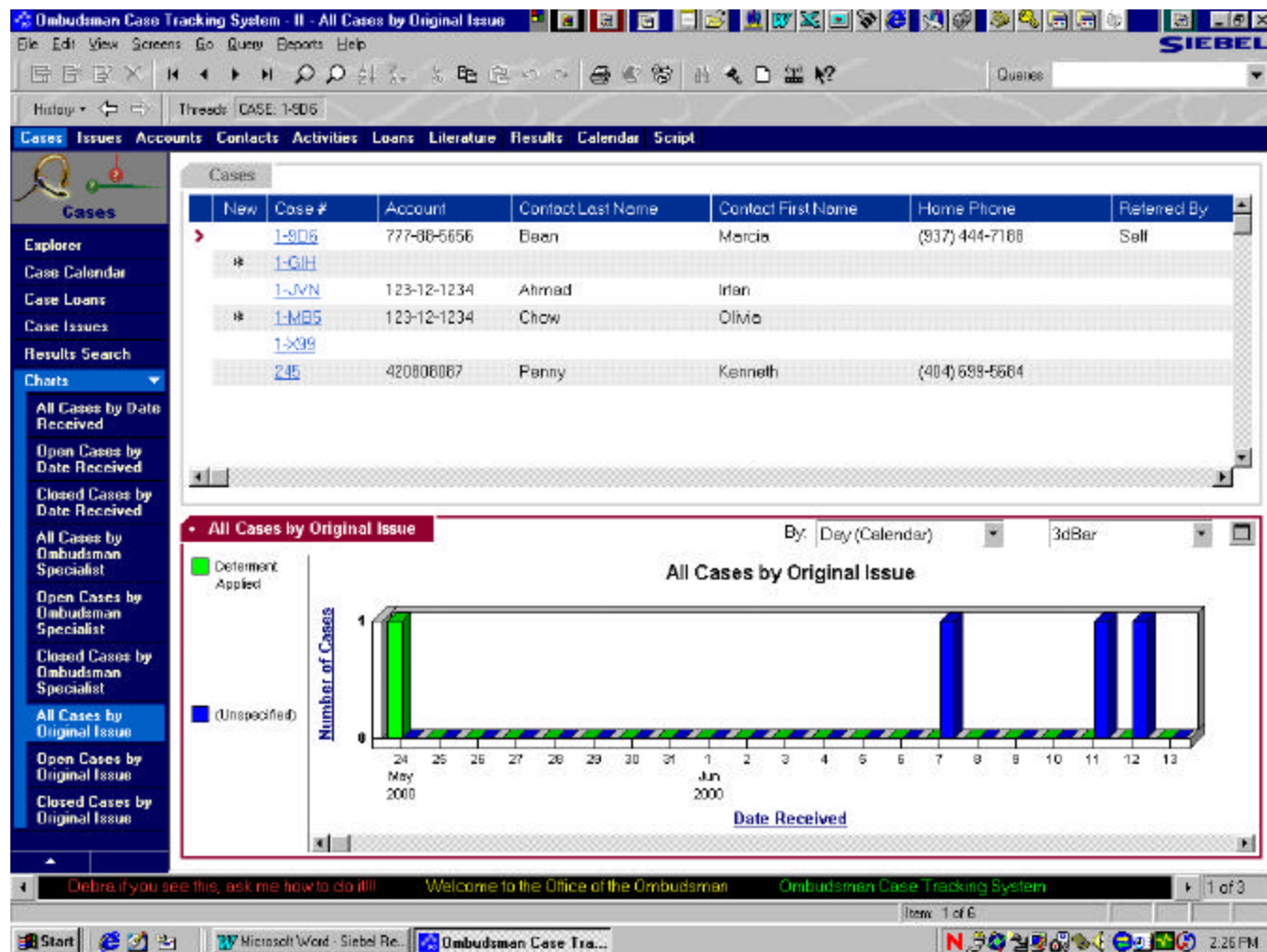
Open Cases By Ombudsman Specialist



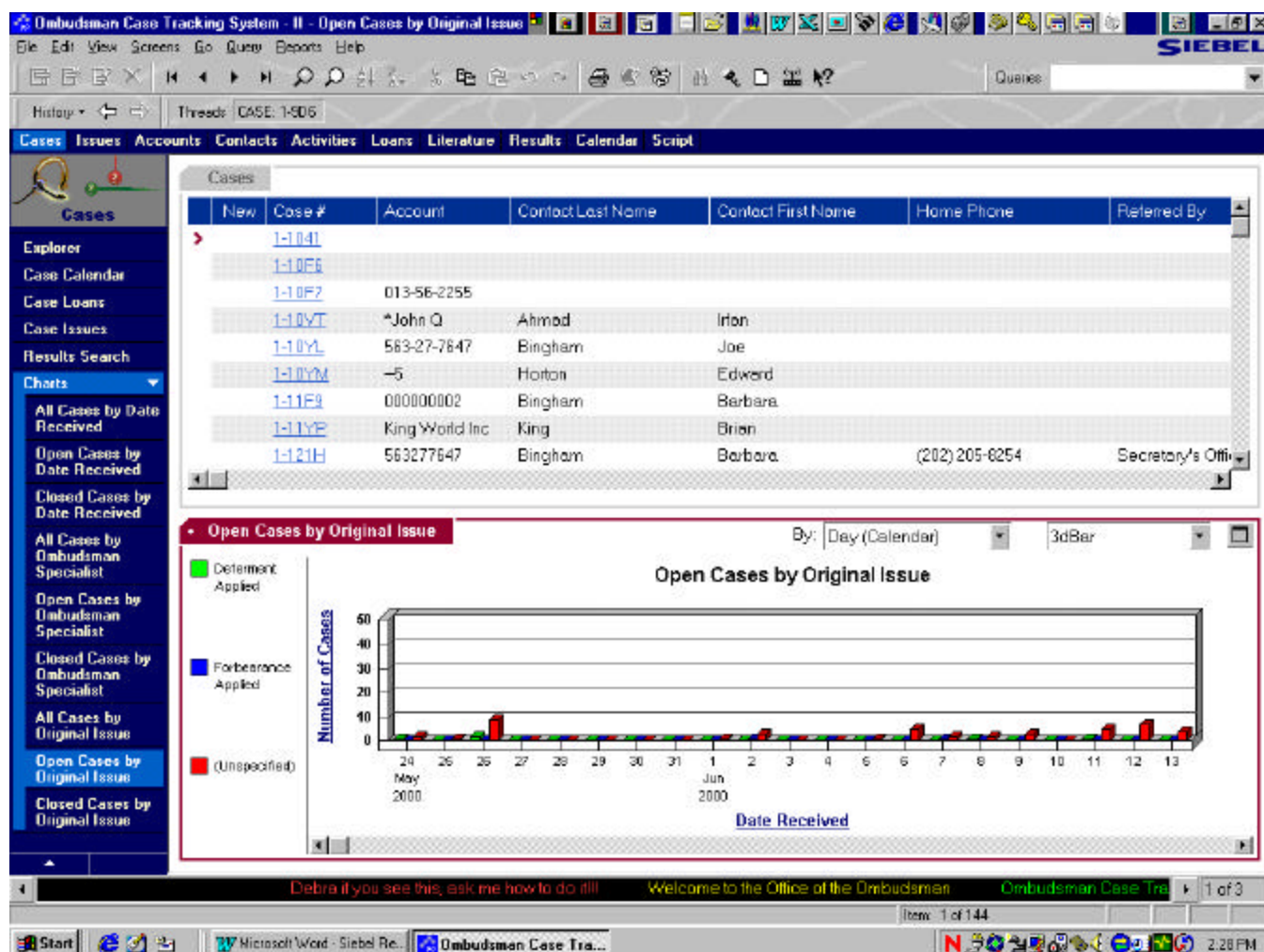
Closed Cases By Ombudsman Specialist



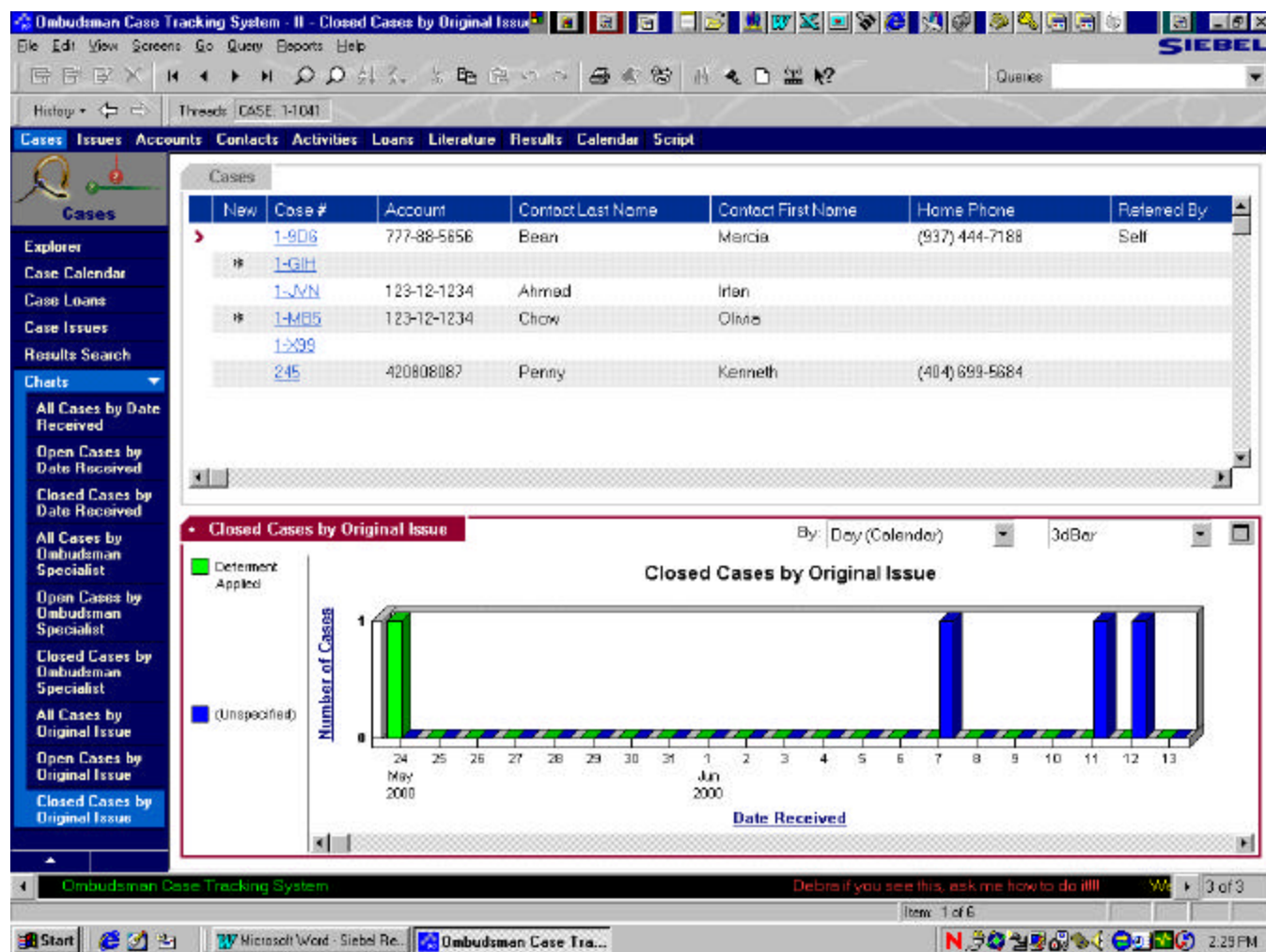
All Cases By Original Issue



Open Cases By Original Issue



Closed Cases By Original Issue



Reporting Validation

The purpose of the validation process is to ensure that the Siebel reports (i.e Siebel Charts and Actuate Reports) have been correctly generated from the respective data in the OCTS 2.0 Siebel application.

All OCTS 2.0 Siebel Charts and Actuate Reports will be validated by generating an existing OCTS 1.0 report and then validating it against a corresponding OCTS 2.0 Siebel Chart or Actuate Report. For example, the Open Cases by Ombudsman Specialist report will be generated from OCTS 1.0 and then validated against the Open Cases by Ombudsman Specialist Siebel Chart in OCTS 2.0. Thus, the total number of open cases for a particular Ombudsman Specialist can be validated in this manner.

Additionally, each Siebel Chart will be validated against the corresponding data in the respective view's list applet to ensure that the chart properly depicts the data it is intended to graphically illustrate. For example, in the Service Request Closed SR Analysis by Owner Chart below, the total number of *closed* service requests in the Service Requests list applet will be validated against the chart displayed in the Closed SR Analysis by Owner chart applet.

